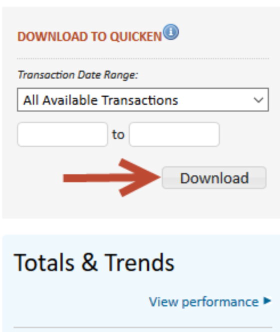
Quicken subscribers can now download data from Liberty

Quicken subscribers can now download a file of balances, holdings, and transactions. This file can be opened in Quicken 2017 & Quicken 2018.

From the “Overview” tab on Liberty, the account owner locates the “Download To Quicken” field. The account owner may choose a time frame or specify a custom time frame to create the file.



The account owner must download files for each separate account.
The Download feature will not download data for subordinate accounts from the primary statement family account.

Important Note: *This functionality is only available to the investor user. Financial advisors cannot request a download on behalf of their client.*

Please let your relationship manager know if you have questions.